DETAILS FOR POSTING 1995 RETAIL ACTIVITY

In order to assist you in determining consumer pressure and promotional effectiveness for 1995 promotions, retail activity placements must be posted to the retail account level. Currently all data being recorded in the hand-held units (Norand & Poqets) are at the retail account level. However, the following four "problem" areas have been identified when capturing retail placements on an actual geographical basis:

1. Value-Added Delivered Promotions
2. Distributor Promotion Coverage (DPC) Delivered Promotions
3. Chain Headquarters (TPS) Requested Promotional Payments
4. Co-Marketing Payments

Due to the volume of data and the amount of administrative work that would be required by the ROU to record activity at account level, several new functions are being developed to update retail placements in mass.

However, during 1995, activity placements will remain at the chain headquarter points for TPS requested payments which is the current method of recording activity. Therefore, a separate reconciliation system will be maintained for retail account placements for geographic summaries in addition to the current chain headquarter points. (TPS requested payments and co-marketing activities fall into this category.)

The retail account placements for DPC discount, TPS requested promotional payments and co-marketing will not affect your budget tracking and activity summaries in SIS, BAN and BPE, but will affect your "Retail Activity Reconciliation" and "Sales Effectiveness Model" with your "Regional Contribution Statement." Details will be forwarded to you in the future related to the "Retail Activity Reconciliation" and the "Sales Effectiveness Model."

Please review the following instructions for the two new functions in BPE that will be available Tuesday, February 28, for value-added delivered and DPC delivered promotions. (Details for chain headquarter and co-marketing activities will be sent to you in the upcoming weeks.)

RETAIL ACTIVITY POSTING FOR VAP DELIVERED PROMOTIONS

1. Enter ACT - ACTIVITY POSTING in BPE.
2. Select Function P10 - ACTIVITY POSTING FOR VAP.
3. You may update activity for a specific wholesaler or by using VAP templates that you have built. Select "ACCOUNTS FOR A WHOLESALER" or "ACCOUNTS IN TEMPLATES."

If you select a specific wholesaler, a window will appear where you can enter the wholesaler number. This wholesaler can be a direct or indirect account.

If you select templates, a list of the templates that you have built will appear. Select the template(s) and press PF5 when you are finished. (Only 20 templates may be used at one time to book activity.)

4. Enter the promotional year for the promotion you are posting activity for.
5. Select the specific promotion. This posting function will only apply to BSGSF and Premium promotions. If the promotion you selected has multiple drive periods, a window will appear for you to select the drive period you are posting activity for.
6. A list of wholesaler(s) will appear indicating the number of retail accounts and total quantities (units). Press PF5 to post the activity. When the updates have been completed, the "Posting Completed" message will appear.

The retail accounts will be pulled from the selected templates or retail accounts linked to the specific wholesaler you entered. Activity posting quantities will be based upon the account quantities you established in the VAP transfer process. If you have appended additional accounts to your templates since you have completed your VAP transfer, the additional accounts will be included with the quantity you specified in the template. This posting function will post activity to accounts within your region and those accounts you service outside your region.

IMPORTANT: You should discontinue posting activity against the direct or indirect wholesaler account in SIS or TPS and use P10 to post activity for value-added promotions.

If you have recorded placements for January & February promotions against the   wholesaler, you should "unplace" these activities using function M72 Activity Update in SIS and follow the above procedures.
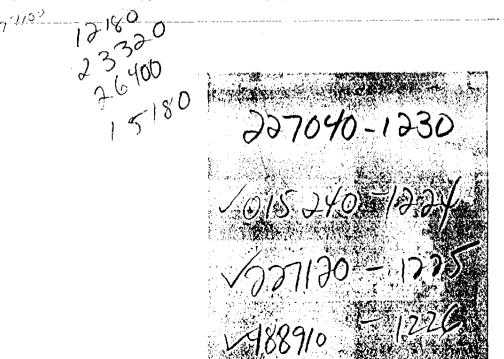
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RETAIL ACTIVITY POSTING FOR DPC DELIVERED PROMOTIONS

1. Enter ACT - ACTIVITY POSTING in BPE.

2. Select Function P20 - ACTIVITY POSTING FOR DPC.

3. Enter the wholesaler number (direct or indirect) that has participated in the DPC program to deliver the promotion to retail accounts.

4. A list of your generic templates that you have built will appear. Select the template(s) and press PF5 when you have selected your template(s). (Instructions for building generic templates are contained in the next section BUILDING GENERIC TEMPLATES for those ROUs that have not used the template process.)

5. Enter the promotional year for the promotion you are posting activity for.

6. Select the specific promotion. If the promotion you selected has multiple drive periods, a window will appear for you to select the drive period you are posting activity for.

7. A screen will appear that shows the wholesaler you entered, the number of retail accounts and total quantities (units). For retail accounts not assigned SIS account numbers, you may post DPC activity against the wholesaler account instead of the retail account. This is a "short-term" solution until all retail accounts can be added to the SIS Master List. To post activity for these accounts, press PF9 N-SIS. Enter units to be posted. These units will be posted against the wholesaler. Press PF5 to post the activity. When the updates have been completed, the "Posting Completed" message will appear.

The retail accounts will be pulled from the selected generic templates you selected. Activity posting quantities will be based upon the account quantities you established in your generic templates. Placement activity will be updated for BSGSF DPC and premium DPC promotions only and will be reported in SIS & BPE. DPC Discount promotions (such as the DORAL DPC Discount promotion for February) selected will not update activity in SIS, BAN or BPE, but retail account activity placements will be contained in the separate system for "Retail Activity Reconciliation" and "Sales Effectiveness Model."

DPC discount promotions such as the DORAL DPC for February have been charged to your region based upon the shipments to direct accounts and not based upon any placement activity. Display payments such as the $5 & $7 payments to wholesalers will not be included in this process. These display payment activities should be posted to the wholesaler and not to retail accounts.

NOTE: If you have recorded discount placements for January and February promotions against the wholesaler, you should unplace these activities using function M72 Activity Update in SIS and follow the above procedures.

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                     23320
                    26400
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227040 - 1230

✓ 015 240 - 1224

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BUILDING GENERIC TEMPLATES

Generic templates can be built for any set of accounts with quantities that fit your business needs. These templates are saved for future retrieval and report generation. The generic template functions are similar to VAP Templates, except the generic templates do not require wholesaler numbers being linked to retail accounts for primary, secondary or VAP wholesalers. These generic templates can be used for any given set of accounts regardless of wholesaler links. Promotional allocations are not affected by these templates; you cannot use generic template to transfer for VAP.

1. Select Function GTP - GENERIC TEMPLATE PLANNING in BPE.

2. Select Function G51 - LINK ACCOUNTS TO GENERIC TEMPLATES.

3. The Master List Selection Menu will appear for you to select the set of accounts you wish to store in a generic template. Enter the selection criteria you wish to store in the template.

4. When the scroll list appears, enter G51 in the Function field. A screen will be displayed showing the number of accounts you selected. Press enter to continue.

5. A scroll list of accounts selected will appear with an input field for you to enter the quantity for each account.

6. To enter quantities in mass, **press PF4**. A window will appear for you to choose a method to populate quantities. You may choose from the following options:

   Enter Default Quantity (assigns the same quantity to each account)
   Local Indicator Quantities
   National Indicator Quantities
   VAP Indicators (PP's)

   Select one of the quantity methods and press enter. The system will pull quantities for the selected accounts based upon the quantity method you selected.

7. To save a new template press PF5 and enter the description for the template you are saving. The description should be meaningful since it will be for future use.

To Append to an existing template:

1. Select the accounts and enter the appropriate quantities as outlined above and press PF6. A list of previously saved generic templates will appear.

2. Select the generic template you wish to append the current set of accounts to. Accounts in the current selection will be updated with new quantities in the template if you enter Y when the duplicate account update window appears. Enter N to keep the previously saved account quantities.

Several additional functions are available for maintaining your generic templates:

- G52 - Generic Template Quantity Maintenance-allows you to change quantities in previously saved templates.

- G53 - Retail Accounts Linked to Generic Templates- allows you to view/update all templates that contain a specific retail account.

- G55 - Print Generic Templates - allows you to format your own report for printing of generic templates.

Program Contacts: Sales Planning - Sharon Reid, extension #2584
Information Resources - Theresa Coleman, extension #3715

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